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UNIVERSITY OF PORTLAND

Catholic Elementary Schools Competitive Analysis: A Case Study of St. John Fisher

Senior Honors Project

Stefania Hajnosz

4/23/2015

Background on Portland Archdiocese

The Archdiocese of Portland was created in 1846 to provide Catholic education to Oregon families (Gilles 2015). It is composed of western Oregon, and totals 50 schools (Gilles 2015). Currently, over 9,000 students are enrolled in both elementary and secondary schools across the schools (Gilles 2015). However, this is a significant decrease from the size of the archdiocese in the past century. In 1954, there were 66 elementary schools and 15 secondary schools, and the number has steadily decreased since (Gilles 2015). The only exception in this data, is the change from 1994 to 2014. While two elementary schools closed, two high schools opened, suggesting the strength of private, Catholic high schools, but the weakening of Catholic elementary schools (Gilles 2015). This is reinforced by the enrollment numbers in high schools. Catholic school enrollment in secondary education is at its highest, currently 5,854 compared to 3,656 in 1954 and 3,873 in 1994 (Gilles 2015). Elementary school enrollment, however has decreased significantly from 1954 (from 16, 468 students to 9, 177 students) (Gilles 2015).

In elementary schools, the ratio of Catholics to non-Catholics in the classroom has shifted. While previously, about 1 in 4 was not Catholic, now 1 in 3 students is not Catholic (Gilles 2015). Secondary education has also seen a rise in non-Catholic students compared to Catholic students (Gilles 2015). However, the number of Catholic students has dropped in elementary schools while non-Catholic enrollment increased, while Catholic enrollment in secondary school has increased, though at a slower rate than non-Catholics (Gilles 2015). While these statistics relate to averages, schools have a wide variety of mixes. Valley Catholic Middle School is only 48% Catholic, while Sacred Heart in Gervais is 97% Catholic (Gilles 2015).

These statistics are important for several reasons. First, it shows that some of these schools appeal to families that are not religious, or of another religion. The Archdiocese needs to

be cautious when creating messaging so as not to isolate these families, since they make up a large section of their market. Additionally, there is a difference in appeal between elementary schools and secondary schools. While both elementary schools and secondary schools are attracting more non-Catholic families than in the past, secondary schools are attracting more students overall, while Catholic elementary schools are losing students overall, and losing Catholics specifically. Something is affecting these types of schools differently, which is where BUS400 comes into play.

Background on Class Requirements

Dr. Holloway and the Archdiocese worked together to come up with a way to narrow the scope of this project; it was too big of a task to fix the entire enrollment issues of the elementary schools. Therefore, they isolated two schools that students would use as case studies to gain insights into potential issues and solutions. These two schools represented a high performing school, and a low performing school. The high performing school had nearly full enrollment and was performing well academically. The lower performing school was having trouble with enrollment and attracting families. St. John Fisher, located just near the border of Portland and Beaverton, was chosen as the good performing school. Archbishop Howard, located in northeast Portland, was chosen as the low performing school.

Once the schools were isolated, Dr. Holloway and the Archdiocese agreed on three problems that student groups would work on. There would be two groups working on each problem; one group would work on a problem with one school, and the other group would work on the same problem, but with the other school. This accounted for the six groups in the class.

The three problems are as follows:

1. *Branding and Brand Strategy: What are the underlying brand elements and cognitive referents currently associated with Catholic elementary schools? How do parents differentiate one elementary school from another, and how should the Archdiocese elementary schools be positioned against competing brands? What communication strategies should be adopted to further growth of the brand among parents of elementary school children?*
2. *Market and Competitor Analysis: Who are the competitors and what products do they offer? Students will perform a market and competitor analysis of non-archdiocese schools (public and private) the curricula used, co-curricular activities, methods of instruction, employee training, degree requirements, and performance outcomes. Students will compare the valuable, rare, and hard to imitate aspects of excellent elementary education, and suggest how these are best organized to deliver outstanding education.*
3. *Marketing Plan Implementation: How fast should changes in marketing be made? What is realistic for a full time working principal to manage on top of their day job running a school? How can consultants be managed to ensure good outcomes? Communication strategies, such as how parents find out about school options and quality education options, will be researched and a rollout plan for marketing and messaging will be produced.*

In order to choose problems, each group had a representative pitch to the class why their group was prepared to take on that particular problem compared to the others. I pitched on behalf of my group, and we were able to pick our top choice: the Market and Competitor Analysis.

Because of the classroom setting and the large number of students interacting with the client, certain parameters were put into place. First, we would have one person designated to communicate with the principal. This meant that the principals would receive emails from no more than three people at a time, which was much more reasonable for their loads. Additionally, further constraints were put on the length of the documents that we sent to the client. This was relatable to a real-world setting, since most individuals, particularly consulting clients, do not have very much time to read information, since they have a full time job to do aside from working with the consultant. This meant the initial five page proposal was cut down to 1 page, and the final document was limited to about ten pages among the three groups.

The importance of competitor analyses

Much as the Market and Competitor Analysis question describes, a competitor analysis evaluates all of the other options that a consumer may choose from. Competitive analyses are performed in every kind of industry. It can also happen at any stage of the product lifecycle since companies will want to know what new products to make by seeing what other companies are making (e.g. Apple made the Applewatch while the open source Pebble was released years earlier). A company with a product in the mature stage (such as Coca Cola) may want to see what other competitors are doing to stay relevant, see what resonates with consumers, or see opportunities for growth and expansion. For example, Coca Cola may not need to do research about how to improve their product, but they may do some research into what Super Bowl ads garner the most response in order to produce a better ad for the next year and do a better job of reminding people to purchase the produce. This helps companies see growing trends in the industry (like wearable technology.)

The ultimate goal is to achieve and maintain a competitive advantage, or something that the others don't have. This could be a specific product (usually achieved by a patent), such as the recipe for Kentucky Fried Chicken, so that no one else can make it, or it could be something intangible. For example, Apple's competitive advantage is its brand. Competitive advantages are important because a company wants customers to choose them for reasons other than price. For example, a consumer at Fred Meyer may purchase the JIF brand peanut butter over the Kroger generic brand because they remember eating JIF as a child, and they want their children to have the same experience. The consumer pays more for JIF, even though it is essentially the same food as the Kroger brand product. It is dangerous for companies to compete on price because that can lead to price wars. Price wars occur when brands compete on price alone and will die if they cannot sell at a price lower than the competitor. This usually results in one or both companies losing money.

While many business professionals and academics have worked to come up with the best ways to analyze the competition, my group chose to use the VRIO framework, as directed in the question assigned to us. In this framework, each letter represents a way to evaluate the competition's offerings. V stands for value, R for rarity, I, for imitability, and O for organization. Theoretically, if a product needs to have these three qualities in order to set it apart from the competition. For example, a product could be valuable, but it isn't rare, then it does not set the company apart. Even if the product is valuable and rare, it may be easy to imitate (like a design for a water bottle) unless its patented, but even then, others will be able to recreate the product once the patent runs out and sells it for a lower price. Organization is also important because the company needs to know how to produce and sell the produce efficiently. Whether this is an operations problem, or a team morale problem can vary between companies. For the purposes of

our project, Organization fell outside of the scope of our needs. Therefore, we focused specifically on whether or not different elements of education were valuable, rare, and hard to imitate among schools similar to St. John Fisher.

Set-Up

Our task was then, to discover what about St. John Fisher was valuable, rare, and hard to imitate that set it apart from competing schools. The hope was that this case study would provide some insights into how to improve Archbishop Howard, the low performing school, and lend some advice to St. John Fisher as the school evolves overtime.

We compared St. John Fisher to four local elementary schools. There schools were Hayhurst School, Raleigh Park Elementary, West Hills Montessori, and Oregon Episcopal School. These four schools were chosen based on a list of perceived competitors from St. John Fisher's principal, location, and type of education. For example, Hayhurst is a public school, but offers grades k-8 like traditional Catholic Schools. Raleigh Park represented a standard public school since it offered the standard k-5 model. The principal also suggested that families were not very price sensitive in the area, so we included private schools as well. Oregon Episcopal School (OES) offers a religious based education and Westhills Montessori also offers a private education, though in an alternative learning style. These four schools had varied programs and offerings which provided a wide array of activities and elements which we could evaluate for uniqueness. One important caveat: we chose not to include other Catholic schools since the principal indicated that they do not want to compete with other Catholic schools. In this spirit, we left out other, local Catholic elementary schools, hoping to find how the Catholic school stood out to other education options.

Because this project involved working with a real client, we had to consider the time constraints of our principal. In order to respect their schedule, Dr. Holloway suggested that each school group (three groups total) put together a 10 page document. While this severely limited the scope of the project, it also meant that the three groups (totaling fifteen students) needed to coordinate our content more than we had planned. After meeting as a group, we decided to focus our analysis around three themes: community, high school links, and education.

For the competitor analysis, we decided to create subcategories that would be the specific factors on which we would evaluate schools. We broke the first theme, community, down into four factors. The first was community across grade levels. We wanted to know if the schools had programs in place to foster community between students of different grade levels. This appeared to be a unique community building factor at St. John's and we wanted to know if it was unique. The second factor was community among parents. While we looked at volunteer programs for parents and other ways that parents were involved in the school beyond a PTA. St. John's principal explained that a parent volunteered to create a brand design for the school, which made us think that creating community among parents and between parents and school was something that we should examine further. The third factor was the connections created between faculty and staff and students. Many people judge schooling based on interactions with the instructor and the supervising adults, so we evaluated this factor by teacher to student ratios. Finally, we evaluated the community surrounding the school, notably, whether or not there was a specific pool from which students were recruited or typically came from. For example, schools usually pooled from a parish or a district. We wanted to see what the potential for recruiting was and whether or not a school relied on a specific group for enrollment or not.

The second theme was “Links to High School.” First, we looked at whether or not attending the specific elementary school would pose an additional cost to the family. This was put into place since we imagined families weighing whether to spend the money on elementary school in addition to high school, rather than simply paying for high school (or only for college.) This makes more sense given the data that many parents are sending children to Catholic high schools, while enrollment in the elementary schools are dwindling. While the costs of the schools varied significantly, we decided that the cost itself was enough of a burden to measure by. Additionally, Principal Holub suggested that families did not appear to be very price sensitive. Therefore schools are labeled either free or tuition based. The second factor was which high schools most students attended after finishing at the elementary school. Mostly, we were interested in whether or not students attended Catholic high schools, since those who attend Catholic elementary school generally have an advantage in the admission process when attending Catholic high schools. Additionally, parents may be considering this factor since it seems that more families send children to Catholic high school than Catholic elementary school.

The last theme was Education. First, we wanted to see if a value system was integrated into the academics. This value system would direct students about basic morals or ethics and hold students to certain standards. This was intended to be distinct from classroom rules, and it was not a mission for the school. We expected that this would be easier to install in a private school because being allowed to speak about religion makes it easier to guide ethics. This is also one way that Catholic schools might try to differentiate themselves, so we wanted to know whether it was actually a differentiator. Second, we ranked quality of education by using resources such as test scores. Finally, we ranked extracurricular activities. Since schools can offer a variety of activities, we created a ranking scale out of 5. They must include sports,

drama, music, and after school care to meet the first 4 points. The fifth point goes to any other miscellaneous activity, such as chess, robotics, or reading groups. Therefore, schools that had many more than five extracurricular activities, may still not receive a 5/5 ranking. While having nontraditional extracurricular activities may be valuable, we imagined that parents would be seeking out those four in particular since they tend to be generally considered standards.

All of these elements set under the themes led to the chart that can be found in the appendix, Figure 1.

Research

We gathered research in several ways. Before we even began working with the themes and the chart, we began doing some overall research about the schools in the area. We sent Principle Holub a one page summary of our findings, and asked for a few resources and pieces of clarification (mostly concerning our objective and which schools to use as competitors).

Then, we met with Principle Holub along with the other three groups working on St. John Fisher at the school. We were given a tour and groups asked questions along the way. We were able to look in several classrooms, and see some of the students. In particular, we spoke with the kindergarten class to find out what they liked most about kindergarten. After the tour, we met for a ten minute meeting with Principle Holub. She had the answers to our questions with her along with the brand design and some marketing materials that the school was currently using.

After the meeting and tour, we worked with the other groups to develop the themes. We created the chart, and then began researching information about other schools. We looked at third party websites and studies, the school websites, emailed and called the schools, and emailed Amy Petti, a contact from Dr. Holloway who trains many principals in the area. We were able to

find information on nearly all of the schools, though we were unable to contact Hayhurst for more information, hence the N/A rating for several programs.

As we worked, we found certain factors were difficult to evaluate. For example, the high schools that students tended to attend had little meaning to us, since we did not know which schools were better than others. Because of time constraints, we were not able to look in depth at the high schools, so any ranking between which high schools people seemed to attend, became irrelevant. However, it may be interesting to see which high schools feed into public versus private high schools, and which schools self-contain (such as OES), and have their own high school. We also encountered problems when it came to ranking quality of education. There was no test or study that compared all of our schools together because some were private and some were public. For this reason, we were only able to rank the public schools, which did not necessarily help us compare to St. John Fisher, a private school.

Findings

Since we had to limit our search, we chose factors that were generally considered to be valuable to education. This meant that all factors in the chart met the “valuable” criteria. Everything was considered valuable because it was included in the chart that we created. Therefore, “valuable” was met just by being a factor for this project. Meeting the criteria of “rare” was different though. Since many of the schools appeared to meet similar standards on the chart, we had to look more closely. We decided to look at the strength, or depth to which these programs or elements were executed. For example, the strong commitment to parent involvement was checked for most schools. This is why we looked more closely at how the schools reported that they involved parents. We looked only at whether or not parents were being involved without volunteer work and whether those programs were specifically for

parental community, or if all of the involvement required parents to give time or work to the school. Once we narrowed it down to parents meeting for the sake of community, it was a rare factor. Other factors considered rare were multi-grade connections, since it had to be over many grade levels and not simply among peers in the same grade, a parish based pool of students, and a full ranking of extracurricular activities.

We did see that OES had an exceptional student to teacher ratio compared to the other schools. While looking at prices for OES tuition their price of \$15,900 for pre-k and \$29,300 for a year of high school seemed to explain how they could have the resources to do this. While valuable, rare, and hard to imitate, this showed how the structure of the education was simply different from the other schools we compared to. In fact, the OES market and the St. John Fisher market may overlap less because of this. In any case, we wanted to find out what made St. John Fisher unique, so we focused on factors where St. John Fisher was able to stand out.

From there, we had to determine what was difficult to imitate. The extracurricular were not very difficult to imitate. Even for activities such as drama or music that may require more investment, with some organization, schools could partner with other programs or community theatres in order to create such opportunities. Therefore, extracurricular activities did not make it to the top tier of this analysis. However, the other three factors were considered to be hard to imitate. First, a parish based pool of students requires a body outside of the school to become organized. Not many schools have this, and it would be extremely difficult for a school to create such a hub because it requires effort in the community, separate from the organization of the school. The second factor considered hard to imitate was multi-grade connections. While it may be easy to create the organization of the program, the most challenging aspect would be finding time in the day for the program to take place. St. John Fisher is able to use weekly

masses as a way to bring grade levels together, but other schools may have difficulty finding time where all students are using their time in the same way and bringing them together. Finally, the parent involvement in the community would be difficult to imitate. Investing the resources into creating events where parents and relax and socialize is difficult enough for schools, especially those on a tax-funded budget, but it is also difficult to create the intangible feeling of community that schools like St. John Fisher has been able to achieve. It is one thing to require volunteer work, or accept volunteer work from service oriented parents. It is another, much more difficult task to create such a relationship with parents that inspires them to offer services, such as creating a brand design for the school.

Finally, we concluded that it is likely the combination of these four factors that contribute to the success of St. John Fisher, since it is difficult to imagine success resting on one factor alone.

Problems with analysis

As mentioned before, the project was greatly limited to do time constraints. Since our timeline was also dependent on communication between Dr. Holloway and the Archdiocese of Portland, the principle's schedule, and the semester schedule, we were not able to flesh out the project as much as we had hoped, and the scope slimmed down as the semester progressed.

These are a few ways that we could have improved the project, given more time.

First, we should have established better grounds for choosing the schools to compare St. John Fisher to. We were fairly confident with the schools we chose since we picked them from the list of perceived competitors from Principal Holub, but it would have been better if we were able to trace which schools attracted similar families. If we had more time, we could have found data to back up those choices with more data than instinct like we had to do in the end.

Additionally, if we had more time, we would have found a way to measure quality of education. There are plenty of different measures, and we certainly would have come up with a formula that mixed accreditation with test scores and classroom statistics to find a reasonable way to compare quality of education across schools.

With more time, we also would have chosen the factors differently. As mentioned earlier, we agreed that all factors were valuable since we put them on the chart, this circular logic is flawed, and it would have been better to choose a wider range of factors and go into more depth in each of them. For example, we could have looked more in depth at the teacher to student ratios to see how big classroom sizes were and how many opportunities students had to work with instructors one on one, especially those needing special attention in certain subjects like math or reading. Additionally, it would have been best if we came up with a way to measure whether or not a factor was actually valuable. Our data is based on what we perceived a parent would consider valuable, which was reasonable considering the consumer is a parent, but even a simple survey to the parents about what they looked for in a school or valued in a school would help justify that part of the analysis.

Another way in which we could have improved this analysis was if we were able to speak with each principle and visited each school. There was a great deal of information that we learned about St. John Fisher because we toured the school and had contact with the principle that we simply could not learn about the other schools. While we were able to get different schools on the phone to talk about certain programs, the communication was limited so that they could only answer the questions we asked. This is unfair, considering that St. John Fisher had over an hour to sell us the variety of programs that the school offered. Additionally, we were not able to contact all of the schools, such as Hayhurst, and we were not able to speak to all of the

principles either. Even if we had had more time, it would have been extremely difficult to attract the attention of these busy principles, so finding an alternative way to gather this information would have been extremely valuable.

Finally, as mentioned earlier, it would have been helpful to talk to the parents of St. John Fisher, though it would have been best if we were able to contact parents of each school. This would help us evaluate how much word of mouth marketing was working, what programs stood out to prospective parents compared to parents with children attending the school, and how those attitudes might have changed overtime. While much more in depth, this could also have shown which programs parents valued at different grade levels, which would have been particularly relevant for St. John Fisher which extends k-8, while many public schools run k-5 and then 6-8.

Issue of Income

While doing initial research on the schools, we saw an important trend among public schools. On one of the maps shown, it appeared that there was a correlation between the ratings a school received and the location in the Portland area: the west side of the city had overall higher ratings, and those ratings decreased as one moved east. (See Figure 3). This led me to wonder what may be the underlying problem. Was it coincidence that there was this divide? Or was there another underlying issue?

First, I looked into the rating system used. This map, while used by Zillow and other real estate search sites, is created by GreatSchools.org, an online nonprofit that aims to inform parents about education options and help them find good schools ([greatschools.org](https://www.greatschools.org)). The website assigns ratings out of out of ten (ten being the highest). The organization uses standardized test scores to evaluate the schools, and while they are beginning to incorporate how much students

learn and college readiness, this data is not yet available in Oregon state (greatschools.org). This explains why most private schools in the Portland area are not rated.

While examining the locations of the two case study schools, the high performing schools is clearly in the green area (See Figure 3 and Figure 4). However, it is not clear where Archbishop Howard, the low performing school, lies. Figure 5 shows that Archbishop Howard is actually on the boarder of this high ranking/ low ranking divide. This suggests that both of the schools may be affected by a larger factor that is affecting all of these schools. Of course, this is speculation since we do not actually have ratings for these schools, unfortunately.

I considered that the underlying factor may be income level. Figure 6 shows the geographical area surrounding St. John Fisher an area dominated by the highest median income group. This may explain why Principal Holub suggested that price was not a major concern for many families. However, Archbishop Howard is in an area that is less well defined. When looking more closely at the data, it appears that the income levels do not directly correlate along the same line as the map in figure 5. This could mean several things. First, one could say that this does not correlate so median family income must not be relevant. However, because the trends do not appear to be completely random from each other, it may be interesting to see which areas contribute tax money to which schools, or which families attend which schools. It may be that families above a certain income level tend to choose a certain school within a district, or choose to send students to private schools outside of the area. In either case, there may be an opportunity to further study median family income in relation to school performance.

Is it the principal?

While talking about the site visit, one group member pointed out how impressive St. John Fisher's principal was. She took the time to give us the tour, appeared to know each student by

name as they passed down the hall, and was able to call on each kindergartener by name in their classroom. Additionally, she sent a thank you/follow-up email to students and Dr. Holloway the same morning that we had visited. She appeared to embody both a caring instructor, and a mission driven principle: a combination many parents would be impressed with. It appeared that she, herself, was a key part of the school that was likely valuable, rare and hard to imitate, as human resources are some of the most difficult resources to replicate. Unfortunately, this could not be considered in our analysis for several reasons. First, we did not have the same kind of access to all of the principals which would have made the ranking system unfair. Additionally, we wanted to find out what was valuable, rare and hard to imitate in order to imitate it at Archbishop Howard. This human resource is so difficult to imitate, that it likely could not be imitated at another school, and would not be helpful information for Archbishop Howard.

Conclusion

Overall, many factors create a successful school, and many of these factors may be applied to the Catholic schools of the archdiocese. While we were able to conclude that community among parents, community across grade levels, and a parish were important to the success of St. John Fisher, there is a great deal of room for improvement of the analysis and there are many directions for research to be done in the future.

Appendix

FIGURE 1

	Community				Links to High School		Education		
	Across Grades	Parents	Connections to Staff/Faculty (Student-Teacher Ratio)	Local Pool (Parish, district, or not applicable)	No Additional Cost to Private High School	High School Prep	Values System	Quality (State Score out of 5)	Extracurricular Options (Ranked out of 5)
St. John Fisher	✓	✓	17:1	Parish	✗	Jesuit High School	✓	Not rated	5
Hayhurst School	N/A	N/A	20.2:1	Portland School District	✓	Wilson High School	✗	4	4
West Hills Montessori School	✓	✓	4:1, 12.5:1, 15:1 (dependent upon program)	N/A	✗	N/A	✓	Not rated	3
Oregon Episcopal School	✓	✓	7:1	N/A	✗	OES	✓	Not rated	5
Raleigh Park Elementary School	✓	✓	18:1	Beaverton School District	✓	Beaverton High School	✓	5	2

Figure 2

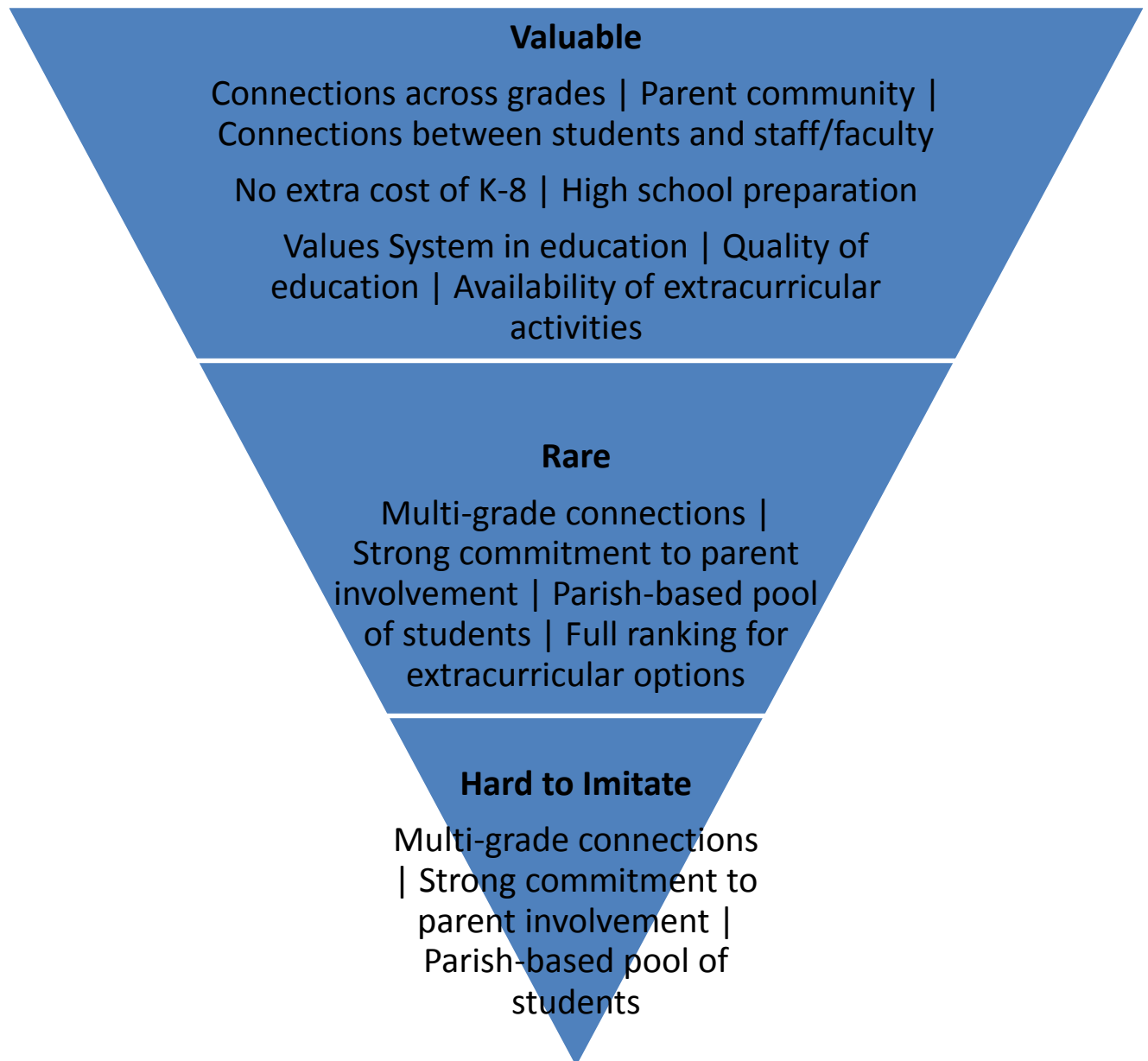


Figure 5

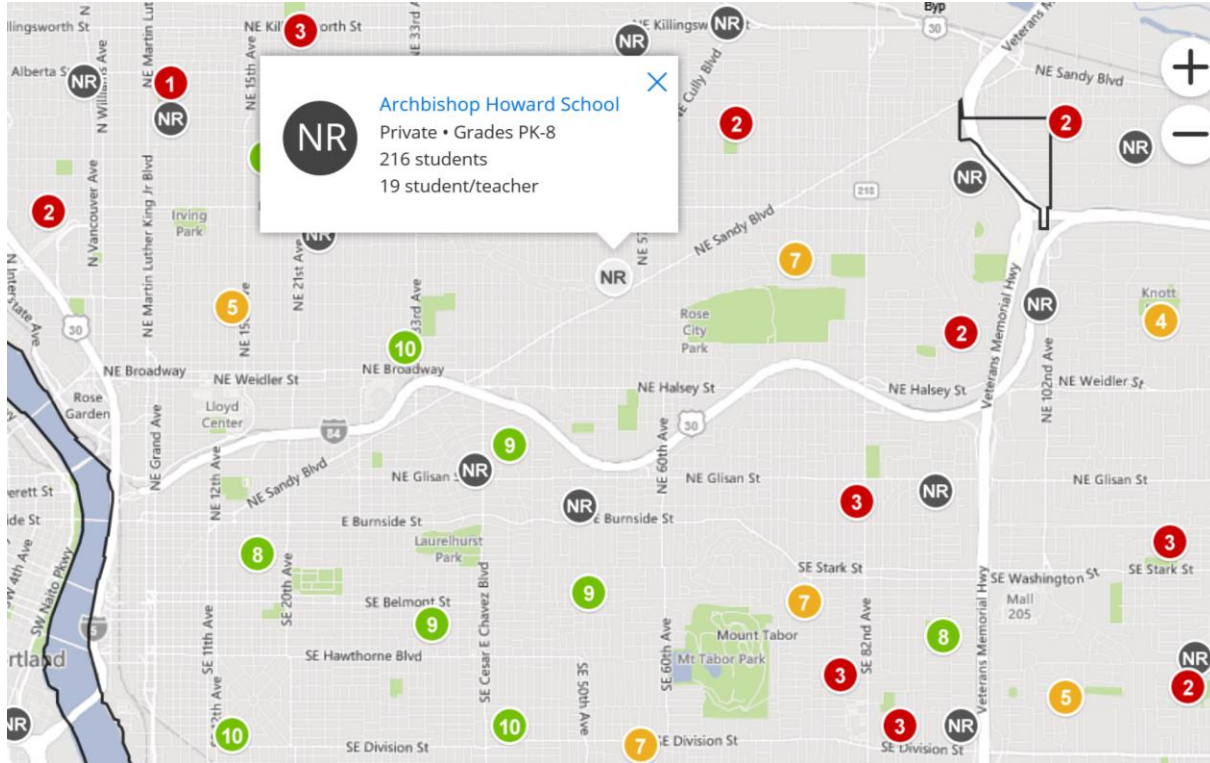
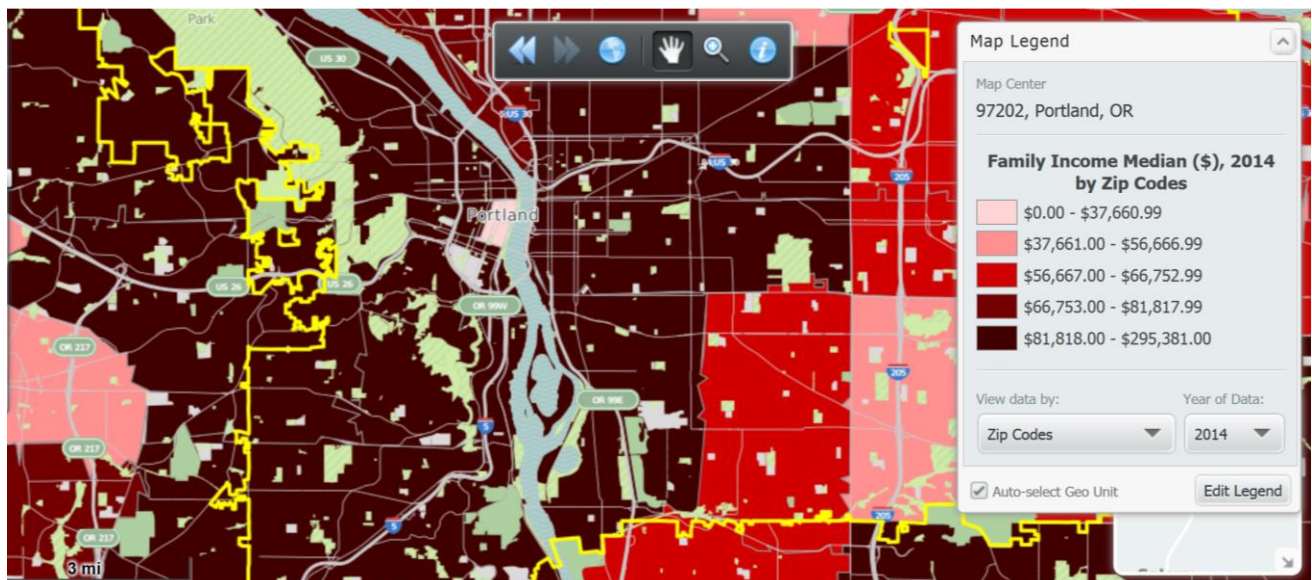


Figure 6



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